


Delivery Review 2024-05-16

i May 16, 2024

 Meeting link:

 Recording Link :

How to Join:

- Google Meet
- Video meeting: camera on

Purpose & Outcome:

- Every 2 weeks on Thursday
- 1 hour
- 10am PT start

i **Objective:** Assess completed increment, gather feedback to guide product & marketing direction, and ensure alignment between product development and marketing strategies.

Agenda

OKR #1	<ul style="list-style-type: none">▼ Increase enterprise contracts by increasing lifetime value of SMB contracts<ul style="list-style-type: none">• 90% of enterprise contracts renew• Achieve \$8.5M in enterprise revenue recognition by year end
OKR #2	<ul style="list-style-type: none">▼ Strengthen our database by increasing data quality, quantity and richness<ul style="list-style-type: none">• 10% of owners retake Business Health Score™• 60% of owners retaking BHS improve their score in 180 days
OKR #3	<ul style="list-style-type: none">▼ Increase owner transactions by increasing value & stickiness of our offering<ul style="list-style-type: none">• 10% of <180 day active owners make ≤ 1 transaction per month

 Governance 2024 | All ideas

 Hello Alice Delivery & Marketing

 Hello Alice Core

Introduction (5-8 mins)

- [@John Zeren](#)

Company Updates (10-12 mins)

- [@Matt Brewster](#)

Product Delivery (12mins)

Sprint Goals

- Base card component
- Support for new card component character count constraints for Guides & Programs
- Support for BHS recommended content tracking

What's next

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- Support Resource & Solutions clean-up with hiding items with end date/expiry

Initiative / OKR	G2024-26: HA Core - Card Consolidation & Update	OKR #2 OKR #3
Stakeholder	@Kelsey Ruger @Marianne Masculino Bethel	
Feature Epic & stories	HAC-14426: Base Card Component DONE HAC-14565: Base card component DONE	
Business/Use case	Build a new component to accommodate all data across all content cards on platform (resources, offers, events, guides, programs, grants)	
Notes/Feedback		

Initiative / OKR	G2024-26: HA Core - Card Consolidation & Update	OKR #2 OKR #3
Stakeholder	@Kelsey Ruger @Marianne Masculino Bethel	
Feature Epic & stories	HAC-14636: New Program Card Implementation DONE HAC-14626: MH - Program editor updates DONE	
Business/Use case	Supports program content data (title & short description) constraints for new card formats	
Notes/Feedback		

Initiative / OKR	G2024-26: HA Core - Card Consolidation & Update	OKR #2 OKR #3
Stakeholder	@Kelsey Ruger @Marianne Masculino Bethel	
Feature Epic & stories	HAC-14634: New Guide Card Implementation DONE HAC-14625: MH - Guide editor updates DONE	
Business/Use case	Supports guide content data (title & short description) constraints for new card formats	
Notes/Feedback		

Initiative / OKR	G2024-19: Business Solution Center Revision	OKR #2 OKR #3
Stakeholder	@Sarah Lowrie @John Zeren @Marianne Masculino Bethel	
Feature Epic & stories	<input checked="" type="checkbox"/> HAC-14247: Recurring automation/job to hide expired BSC offers & events DONE	

@Marianne Masculino Bethel	
Business/Use case	Supports clean-up of offers that have an expiry date
Notes/Feedback	

Initiative / OKR	G2024-35: Business Health Score Retake	OKR #2 OKR #3
Stakeholder	@Kelsey Ruger @Marianne Masculino Bethel	
Feature Epic & stories	HAC-14207: Business Health Score v2 Discovery IN PROGRESS HAC-14479: Update query on CCv2 and Segment events DONE	
@Marianne Masculino Bethel		
Business/Use case	Supports data tracking of recommended BHS content and activity/engagement on each content piece (guide or program)	
Notes/Feedback		

Marketing & Enterprise Delivery (12 mins)


Current Initiatives

- Ebay Up and Running - Grant (no Boost Camp)
- Etsy - Grant, Boost Camp, Virtual Event (see Virtual Forum)
- Antares - Grant and Boost Camp
- Progressive - Grant + Boost Camp
- BGE - Grant (no Boost Camp)
- Doordash - Grant (no Boost Camp)
- Chicago Listening Tour - June 3rd: Wells Fargo is the Partner
- 1st Virtual Forum - June 12th: Uplifting Creative Entrepreneurs with Etsy

What's next

- Tiger Global - Boost Camp Only
 - Pepsi - On Hold
 - MC Strive Increase Membership & Engagement
 - Comcast Engagement/Coaching
- In the Pipeline:
- Wells Fargo
 - Shopify
 - H&R Block 2025







Initiative / OKR	HADM-1599: Hello Alice Promo Kits IN PROGRESS Creation of Promo Kits to promote Hello Alice Offerings	OKR #1 OKR #2 OKR #3
Stakeholder	@shelby.strong (Unlicensed)	
Feature Epic & stories	HADM-1599: Hello Alice Promo Kits IN PROGRESS	

 @shelby.strong (Unlicensed)	
Business/Use case	
Notes/Feedback	Promo kits to include copy and graphics for: <ul style="list-style-type: none"> • General “Sign up for Hello Alice” for all small businesses across industries and stages. Copy and graphics should convey why they should join Hello Alice to grow their business. • “Sign up for Hello Alice Small Business Mastercard” for orgs who are looking to surface a credit card product to their SMBs. Copy and graphics should convey why they should choose our card over another card product. • “Take your Business Health Score” assets for organizations that work directly with SMBs to help them get ready for capital infusion. Copy and graphics should convey why the BHS is a helpful FREE tool.







Initiative / OKR	Grant Programs	OKR #1 OKR #2 OKR #3
Stakeholder	@LaToya Rattieff	
Feature Epic & stories		
Business/Use case		
Notes/Feedback	Latoya will discuss open grants, boost camp application process, and strategies.	

Release Notes


🚩 Product Release Notes

Type	Status	Priority	Key	Summ
	DONE	==	HAC-15244	[card cor
	IN REVIEW	==	HAC-15240	[program
	NOT DOING	==	HAC-15237	[MH] gui
	DONE	==	HAC-15235	[applicati
	IN PROGRESS	==	HAC-15234	Spike B-
	IN PROGRESS	==	HAC-15214	Extend C

🚩 Marketing Release Notes

Type	Status	Due date	Key	S
	IN PROGR...	Jul 30, 2024	HADM-23...	HA
	TO DO	Jul 26, 2024	HADM-22...	[E]
	TO DO	Jul 26, 2024	HADM-22...	[A]
	TO DO	Jul 26, 2024	HADM-22...	[A]
	TO DO	Jul 31, 2024	HADM-22...	[A]
	DONE	Jul 22, 2024	HADM-22...	[W]

Type	Status	Priority	Key	Summ
<input checked="" type="checkbox"/>	TO DO	==	HAC-15212	(Due 8/1
<input checked="" type="checkbox"/>	TO DO	==	HAC-15211	(due 8/10
<input checked="" type="checkbox"/>	TO DO	==	HAC-15197	Update c
<input checked="" type="checkbox"/>	IN PROGRESS	==	HAC-15196	[WR] Col

27 items Synced just now 

Type	Status	Due date	Key	S
<input checked="" type="checkbox"/>	DONE	Jul 25, 2024	HADM-22...	[E]
<input checked="" type="checkbox"/>	DONE	Jul 26, 2024	HADM-21...	[E]
<input checked="" type="checkbox"/>	DONE	Jul 18, 2024	HADM-21...	[E]
<input checked="" type="checkbox"/>	DONE	Jul 15, 2024	HADM-21...	Pr

151 items Synced just now 